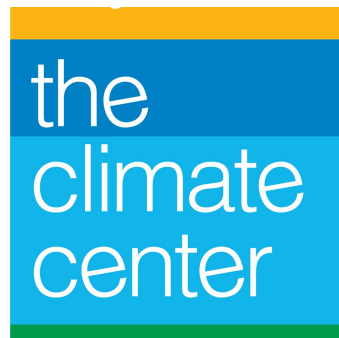


# Demand Flexibility as Affordability Solution

California Climate  
Policy Summit 2026



# Smarter energy for homes and the grid

40

States

Participate in thermostat programs or behavioral and mixed device programs.



PROVEN DR RESOURCE

100+

utility demand response programs & markets



SCALED IMPACT

4 GW

shiftable residential load in the United States



LARGE RESIDENTIAL DR PLATFORM

5M+

shiftable smart homes in North America



LARGE PLATFORM FOR LEARNING

50B+

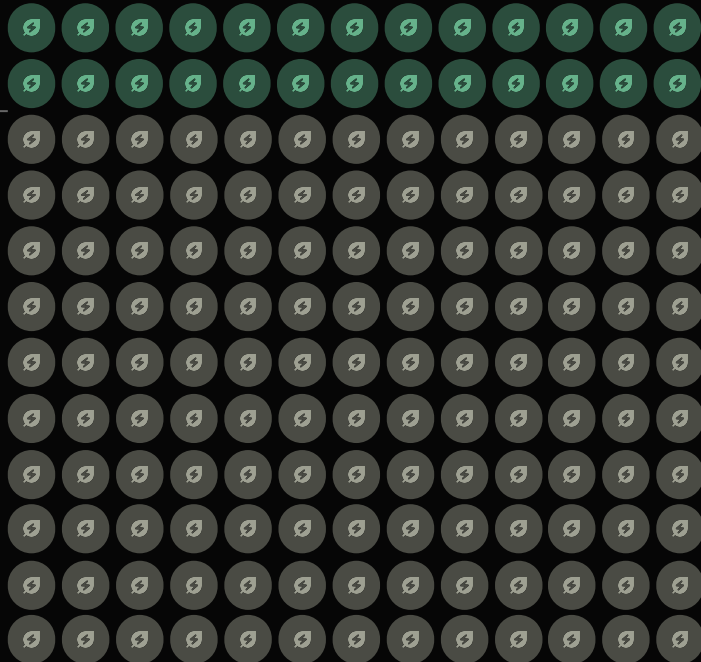
new data points every day

# Traditional DR programs have historically engaged early adopters.

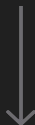
BYO Thermostat

3-4 hrs  
3-4°F offsets

Non  
participants



Traditional DR programs have historically engaged early adopters.



Streamlining enrollment can deliver nearly 4x the participation<sup>1</sup>

1. Based on comparison of Nest Renew (75% of customers turn on Energy Shift during device set up and 10-20% enrollment in traditional DR programs (EIA 861)

### BYO Thermostat

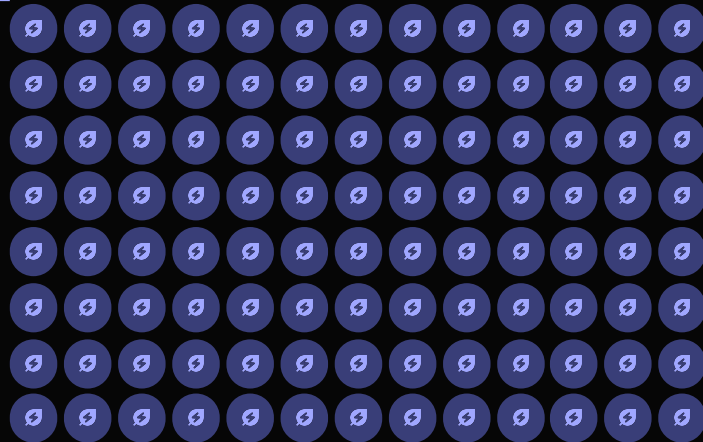
3-4 hrs  
3-4°F offsets



### Personalized Energy Shifts

1-2 hrs  
0.5-2°F offsets

Simpler & more comfortable way to earn rewards



### Non participants



# California ESC Test Event

## 223 MW 2-Hour Load Reduction

### → Details

#### Date

September 2, 2025

#### Time

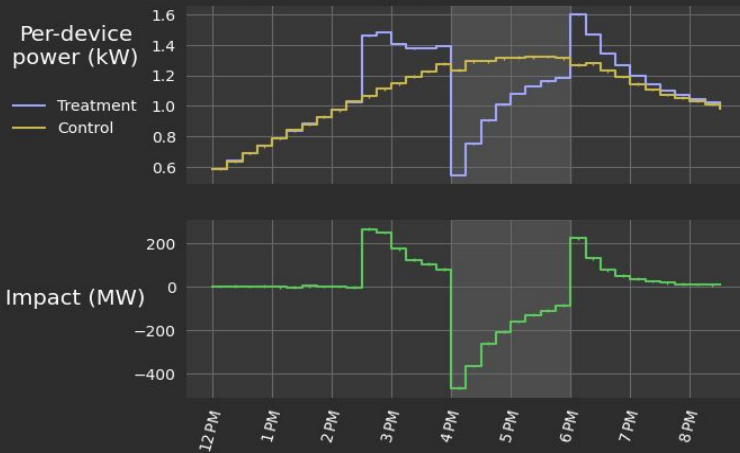
4–6pm

#### Pre-conditioning

1.5 hours

#### Assumed AC power

2.5 kW / thermostat



1. Outdoor temperature data is collected from the Google Nest device network at 15-minute intervals. The aggregate temperature value is derived from a weighted average, factoring in the geographical and spatial distribution of the device population. The weather information utilized by all Nest devices is provided by the Google internal weather service.

# Unlocking Latent Capacity

	Present	Future
Participant Identification	Utility Account Number	Address
Load Impact Measurement	Electric Meter, Historical Baseline	HVAC Runtime + Device Data, Randomized Controlled Trials
Dual Enrollment Prohibition	Home / Site Level	Device Level
Solar + Storage Exports	Excluded from Performance	Included in Performance

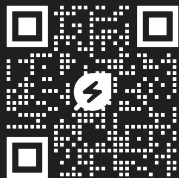


# Unlocking Latent Capacity

	Present	Future	DSGS*	SB 913
Participant Identification	Utility Account Number	Address	✓	✓
Load Impact Measurement	Electric Meter, Historical Baseline	HVAC Runtime + Device Data, Randomized Controlled Trials	✓ ✗	✓ ?
Dual Enrollment Prohibition	Home / Site Level	Device Level	✓	✓
Solar + Storage Exports	Excluded from Performance	Included in Performance	✓	✓
System Planning	Included in Resource Adequacy		✗	✓

\*Demand Side Grid Support, Batteries (Option 3) & Thermostats (4)

# Thank you



Download our technical white paper

**Scaling Residential Demand Response  
by Prioritizing Comfort: Evidence from  
25M Energy Shifts**

